## **USDA Weekly Retail Turkey Feature Activity**

Fri. Feb 01, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/01 thru 02/07.

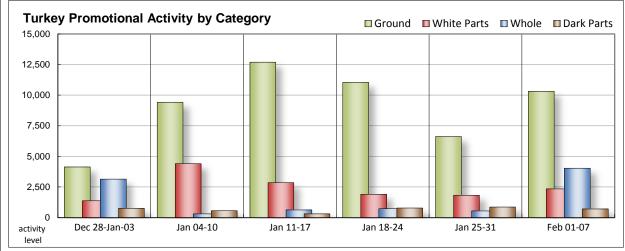
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

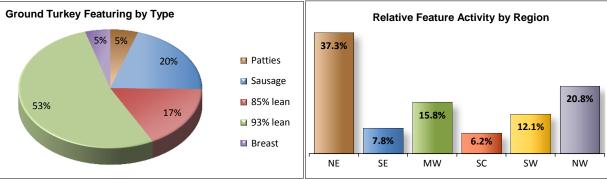
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST YEAR							
Feature Rate 1/		of 23,200		of 23,200	29.9% of 22,500							
		tlets		tlets	outlets							
Special Rate 4/		3%	_	3%	1.3%							
Activity Index 2/		,710		,600		250						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:				4.00	4.0	4.40						
Fresh - Hens			20	_	10	1.18						
- 101115	0.070	4.00	20	_	10	1.18						
Frozen - Hens	2,070		250		410	1.34						
" - Toms	1,960	1.05	250	1.67	510	1.37						
PARTS:												
Breast:												
Bone-in, whole			20	0.46	20	0.40						
Fresh Frozen	4 740	2.08	20 660	_	30 890	2.42 1.93						
Split, bone-in	1,710	2.08	000	1.60	890	1.93						
Fresh	250	3.99			160	2.69						
Rotisserie	50		570	8.35	480	7.83						
Boneless, whole	20	_	370		400	7.03						
•					040	4 2 4						
Cutlets	90		330		940	4.34						
Cutlets, thin sliced	150	4.99	130	4.99								
Strips												
Tenders	70		80		200	4.54						
Marinated Tenders	570		1,130		230	4.50						
Drumsticks	230	_	170	-	120	1.60						
Thighs	190		10									
Wings	200	2.09	140	-	80	1.54						
Necks			130		10	1.59						
Smoked Drumsticks	50		130		90	2.16						
Smoked Wings	30	2.60	140		90	2.16						
Smoked Necks			140		60	1.89						
GROUND TURKEY:	10,310		6,620		3,520	3.57						
Patties	510		630		250	4.16						
Sausage	2,090		820		440	3.54						
85% lean	1,770		1,360		90	2.24						
93% lean	5,480		2,720		2,400	3.19						
Breast	460		1,090		340	5.39						
Rolls (frsh/frz 1 lb.)	280	2.26	290	2.30	1,050	1.02						
Specialty 5/	500	2.00	450	4.04								
Patties	520		150		0.40	0.70						
93-94% lean	960	4.27	150		340	3.73						
Breast	L		40	5.74	20	5.49						

Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Promotional activity increases heading into the first of the month. Shoppers will find plenty of frozen hens and toms offered this week; prices are sharply lower as retailers clear existing inventories. A whole turkey deep fried would be a hit for Super Bowl parties this weekend. Frozen bone-in breasts are heavily promoted, but these will cost substantially more compared to last week. Rotisserie breasts all but disappear from the circulars. Retail activity slows on boneless white parts, mostly ads on marinated tenders at higher prices. Offerings increase on fresh dark parts, decrease on smoked dark parts. Ground turkey is heavily promoted and the weighted average price is lower. Over half the ads promote 93% lean but offerings on sausage are plentiful this week. Deli feature activity slows as fewer stores promote self-service deli. Service deli offerings increase on turkey whole muscle meats and thin slicing meats, and on chicken whole muscle meats. The largest increase is in processor brand thick slicing meats. Self-service deli offerings slow due to fewer ads on chicken.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.		SOL	JTHEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  29.9% of 4,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 3,470  Price Range Summary			
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,I	RI,VT)	(AL,FL,GA,	MS,NC,SC,TN,VA	,WV)				
Feature Rate 1/		0 sampled outle	. ,	, , , , ,	,100 sampled ou	,				
Special Rate 4/	1.3% of stores w	•			s w/ no-price pro					
Activity Index 2/		Index = 9,010			ity Index = 2,570					
Activity illucx	Price Range	Summar	°V	Price Range	Sumn	narv				
	(\$/pound)		Vtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.98 - 1.49	830	1.10	0.99 - 1.29	120	1.01	0.89 - 1.29	540	1.07	
" - Toms	0.98 - 1.49	830	1.10	0.99 - 1.29	120	1.01	0.89 - 1.29	490	1.06	
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.79 - 2.29	730	2.06	1.19 - 2.27	270	2.17	1.68 - 2.29	380	2.03	
Split, bone-in										
Fresh	3.99	250	3.99							
Rotisserie	6.89	40	6.89				7.48	10	7.48	
Boneless, whole	4.99	10	4.99							
Cutlets	3.99 - 5.00	80	4.67				5.45	10	5.45	
Cutlets, thin sliced	4.99	150	4.99							
Strips										
Tenders	3.29	70	3.29							
Marinated Tenders	3.73 - 4.66	510	4.23	4.26	40	4.26	4.53	20	4.53	
Drumsticks	1.29 - 2.19	220	2.03				1.49	10	1.49	
Thighs	2.00 - 2.19	180	2.18				1.49	10	1.49	
Wings	1.29 - 2.19	200	2.09							
Necks										
Smoked Drumsticks	2.49	20	2.49				1.49 - 1.99	20	1.74	
Smoked Wings	2.49 - 3.49	20	2.91				1.99	10	1.99	
Smoked Necks										
GROUND TURKEY:										
Patties	2.99 - 3.99	60	3.60				2.49 - 3.99	210	3.45	
Sausage	2.79 - 4.29	1,630	3.57	3.39	120	3.39	3.49 - 3.99	310	3.89	
85% lean	1.99 - 2.99	600	2.67	1.99 - 2.99	560	2.34	1.99 - 2.80	180	2.36	
93% lean	2.83 - 3.84	920	3.19	2.80 - 3.99	1,310	3.41	2.79 - 3.99	1,010	3.21	
Breast (99-100% lean)	3.84 - 5.38	210	4.57	5.38	20	5.38	4.79	10	4.79	
Rolls (frsh/frz 1 lb.)				1.79	10	1.79	2.19 - 2.50	230	2.45	
Specialty <sup>5/</sup>										
Patties	3.99	520	3.99							
93-94% lean	3.99 - 6.99	930	4.27				3.79	20	3.79	
Breast										





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (	CENTRAL U.S.		SOU	THWEST U.S.		NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  58.5% of 1,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 1,370			
	(AR,AZ,CO,KS,I	LA,MO,NM,OK,TX	(,UT)	(	CA,HI,NV)					
Feature Rate 1/	26.9% of 4,20	00 sampled outle	ts	49.2% of 2,	900 sampled outl	ets				
Special Rate 4/	0.0% of stores w	// no-price promo	otions	0.0% of stores	w/ no-price prom	otions				
Activity Index 2/	Activity	Index = 1,360		Activit	y Index = 1,930					
·	Price Range	Summa	Price Range	Summa	ary	Price Range Summary				
	(\$/pound)	Stores \	Vtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	1.19	100	1.19	0.99	250	0.99	0.89 - 0.99	230	0.98	
" - Toms	1.19	40	1.19	0.99	250	0.99	0.89 - 0.99	230	0.98	
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.77 - 1.99	120	1.87				1.79 - 2.29	210	2.27	
Split, bone-in										
Fresh										
Rotisserie										
Boneless, whole	3.99	10	3.99							
Cutlets										
Cutlets, thin sliced										
Strips										
Tenders										
Marinated Tenders										
Drumsticks										
Thighs										
Wings										
Necks										
Smoked Drumsticks	1.89	10	1.89							
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties	3.49	40	3.49	3.99	200	3.99				
Sausage	3.99	20	3.99	3.27	10	3.27				
85% lean	2.44 - 2.74	230	2.57				3.19	200	3.19	
93% lean	2.79 - 3.69	610	3.01	2.79 - 3.19	1,160	3.00	2.79 - 3.29	470	2.83	
Breast (99-100% lean)	3.27 - 3.99	140	3.35	4.39 - 5.51	50	5.29	3.99 - 4.38	30	4.25	
Rolls (frsh/frz 1 lb.)	1.29	40	1.29							
Specialty <sup>5/</sup>										
Patties										
93-94% lean				4.59	10	4.59				
Breast										

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### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/01 thru 02/07.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)			N,WV)	
5	70.1% o	f 23,200	70.7% o	f 23,200	65.4% o	f 22,500								
Feature Rate 1/	sto	res	sto	res	sto	res	86.6% of 4,600 sampled outlets			61.3% of 6,100 sampled outlets		tlets		
Activity Index 2/	44	620	45	270	12	260	Activity Index = 15,210			Activity Index = 9,550				
Activity index 21	44,	020	45,	210	40,	200	Price I	Range	Sum	mary	Price	Range	e Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/po	und)	Stores	Wtd Avg	(\$/pc	ound)	Stores Wtd Avg	
SERVICE DELI - Turkey														
Category 1														
Processor Brand	5,440	8.12	2,580	8.10		7.93	5.98		2,720		6.99		1,330	8.20
Private Brand	1,730	7.85	2,960	7.82	1,970	7.34	5.99	- 8.99	1,250	8.07		7.49	210	7.49
Category 2	4.050	F F0	4.000	<b>5</b> 04	4.040	<b>5.07</b>	4.00	7.57	4 000	5.00	4.00	0.00	0.40	5.00
Processor Brand Private Brand	4,850 3,630	5.59 7.02	4,020 2,530	5.94 5.73	4,940 4,310	5.67 7.27	4.99 - 4.99 -		1,230 1,700		4.99 - 6.49 -		640 180	5.98 6.83
Category 3	3,630	7.02	2,530	5.73	4,310	1.21	4.99 -	7.99	1,700	6.67	6.49 -	7.99	180	6.83
Processor Brand	770	3.62	1,000	3.95	870	4.48	2.99 -	3.99	300	3.75				
Private Brand	180	4.90	240	5.04	120	4.48	3.99 -		60					
Turkey Ham	100	4.90	240	5.04	120	4.70	3.99 -	4.50	00	4.71				
Processor Brand	200	3.56	710	3.30	610	3.55	3.99 -	4 99	80	4.32				
Private Brand	60	3.98	7.10	0.00	40	3.98	3.98 -		60					
Turkey Pastrami		0.00				0.00	0.00	0.00		0.00				
Processor Brand	330	3.48	540	4.09	500	4.07		3.99	80	3.99				
Private Brand	000	00	0.0		000			0.00		0.00				
SERVICE DELI - Chicken														
Category 1														
Processor Brand	3,610	7.24	2,360	7.81	4,170	7.01	5.98	- 8 99	1,780	7.40	5.99	- 8.99	1,360	7.16
Private Brand	1.440	7.12	1,170	7.52	300	7.47	6.99		1,290		0.00	7.49	130	7.49
Category 2	.,		.,		000		0.00		1,200					
Processor Brand	170	5.69	90	4.92	220	6.94								
Private Brand	70	5.99	1,420	5.10										
SELF-SERVICE DELI			, -											
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	10,620	3.11	10,230	2.94	8,380	3.10	2.48 -	3.99	1,720	3.40	1.96 -	3.99	3,040	3.08
Private Brand	1,120	3.11	1,160	2.98	990	3.15	2.89 -	3.49	580	3.10		3.49	20	3.49
Turkey 16 oz														
Processor Brand	480	4.58	2,890	5.43	110	5.08	4.69 -		200		3.79 -	5.00	140	4.10
Private Brand	120	6.29	170	4.99				6.29	120	6.29				
Chicken 7-10 oz														
Processor Brand	8,870	2.97	10,040	2.94	7,460	3.10	2.48 -		1,460		1.96 -		2,480	2.92
Private Brand	930	3.03	1,160	2.98	990	3.15	2.89 -	3.49	580	3.10		3.49	20	3.49

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/									
		sampled outlets	•	0 sampled outlets	52.4% of 2,900 sampled outlets	70.4% of 1,200 sampled outlets			
Activity Index 2/		ndex = 8,960		ndex = 6,540	Activity Index = 2,790	Activity Index = 1,570			
	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range Summary (\$/pound) Stores Wtd Avg	Price Range Summary (\$/pound) Stores Wtd Avg			
SERVICE DELI - Turkey	(ф/роспа)	Clores Wild Awg	(φ/ροαπα)	Otores Wid / Wg	(w/pound) Ctores Wild /Wg	(¢/pound) Ciores Wid Nig			
Category 1									
Processor Brand	5.95 - 10.49	630 7.29	6.98 - 9.99	380 8.26	8.49 - 9.99 270 9.87	7.99 - 9.99 110 9.62			
Private Brand	5.99 - 9.99	180 6.87	6.99 - 7.99	90 7.54					
Category 2									
Processor Brand	4.89 - 6.99	670 5.70	4.49 - 5.99	1,220 5.21	4.99 - 5.99 840 5.39	4.99 - 6.99 250 5.36			
Private Brand	4.95 - 7.99	230 6.37	5.99 - 7.99	640 6.89	7.99 550 7.99	7.99 330 7.99			
Category 3									
Processor Brand	2.99 - 4.49	360 3.49			3.59 50 3.59	2.98 - 5.99 60 3.73			
Private Brand				120 4.99					
Turkey Ham									
Processor Brand	5.49	20 5.49	2.19 - 3.19	40 2.53	2.49 - 2.99 60 2.58				
Private Brand									
Turkey Pastrami									
Processor Brand	2.99 - 5.49	250 3.32							
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.95 - 7.99	260 6.90	5.99 - 6.99	200 6.55		10.99 10 10.99			
Private Brand				20 7.99					
Category 2									
Processor Brand	4.98 - 5.99	170 5.69							
Private Brand	5.98 - 5.99	70 5.99							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz	0.04	0.400	4.00 0.77	4.050	0.00 0.00 0.47	0.40 0.00			
Processor Brand	2.24 - 3.99	3,180 2.99	1.96 - 2.77	1,950 3.12	2.99 - 3.99   390 3.17 2.79   130 2.79	2.49 - 3.99 340 3.10 2.79 70 2.79			
Private Brand Turkey 16 oz	2.99 - 3.00	130 2.99	3.50	190 3.50	2.79 130 2.79	2.79 70 2.79			
Processor Brand	4.99	20 4.99	3.69 - 4.99	120 4.51					
Private Brand	4.33	20 4.99	3.09 - 4.99	120 4.31					
Chicken 7-10 oz									
Processor Brand	2.24 - 3.88	2,660 2.80	1.96 - 2.77	1,570 2.92	2.99 - 3.99 370 3.14	2.49 - 3.99 330 3.08			
Private Brand	2.99 - 3.00	130 2.99	1.00 - 2.11	1,070 2.02	2.79 130 2.79	2.79 70 2.79			
1 Tivate Blattu	2.00 - 0.00	100 2.00	1		2.10 100 2.19	2.10			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)